Sustainable Tourism Roundtable Report

Working Draft
December 8, 1998

Release Date: February 8, 1999

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Introduction

On December 8, 1998, the United States Environmental Protection Agency (EPA) and the World Travel and Tourism Council (WTTC) launched a national discussion about tourism and the environment thus filling a leadership vacuum that has stalled progress to date. Until now little discussion and even less action have taken place on the topic of tourism and the environment. The first Sustainable Tourism Roundtable was the beginning of a new effort to constructively restart that dialogue.

Designed as a participatory meeting, the Roundtable brought together forty-five tourism and recreation stakeholders from around the country. The diverse set of participants, representing the Travel and Tourism Industry, government, academia and non-governmental and advocacy organizations, demonstrated keen interest and actively participated in the Roundtable. Some participants included: Marriott Corporation, Avis, World Travel and Tourism Council, Patagonia, National Geographic Traveler, Carnival Cruiselines, Bureau of Indian Affairs, State of Oregon, World Wildlife Fund, National Trust for Historic Preservation, and many others. A complete list of participants can be found in Appendix A.

Roundtable Objectives

- to think strategically about a vision and action steps for environmentally-friendly tourism worldwide

- to discuss ways government agencies and the international travel and tourism industry and its stakeholders can work in partnership

- to explore the establishment of a standing travel and tourism leadership group to address both national and international matters.

Roundtable Design

The Roundtable was structured to allow for active participation and collaboration through a series of professionally moderated activities. These activities included a timeline, and the development of a series of posters beginning with individual organization's poster's then evolving into group developed posters elaborating on common drivers, barriers and an industry-wide vision for sustainable tourism. A copy of the Roundtable Participant Packet with explanations of all of the activities can be found in Appendix B.

Welcome

The meeting began with welcome and greetings by Rob Wolcott, Deputy Assistant Administrator for the Office of Policy, EPA; Geoffrey Lipman , President WTTC; and Donald Hawkins, Director International Institute of Tourism Studies at The George Washington University.

The meeting was led by professional meeting facilitator, Richard Brown, EPA.

Briefing Reports

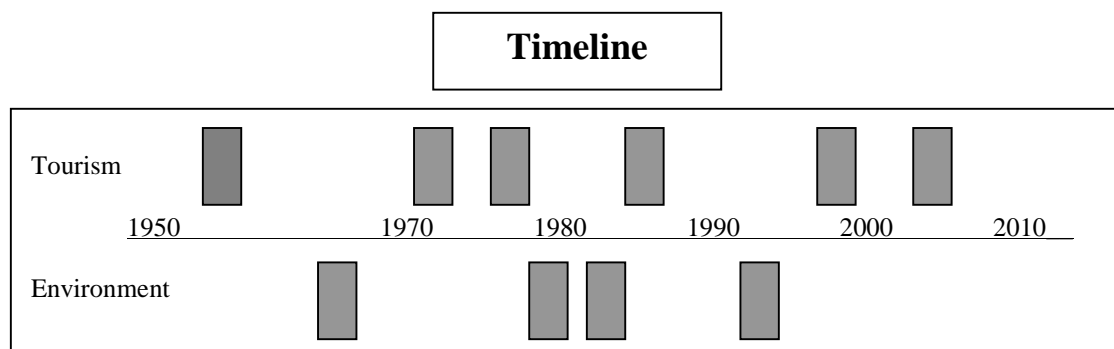The primary focus of the Roundtable was to establish a working dialogue with the Travel and Tourism Industry. As a first step, EPA, WTTC and Abt Associates briefed the participants on current initiatives and research related tourism and environment. GWU provided additional contextual information in poster format. These presentations are summarized in the following sections. Additional information can be found in Appendices C, D, E and F respectively.

Timeline

The interactive portion of the meeting began with a timeline exercise. Participants were asked to identify key environmental and tourism events that have occurred from 1950 through the present and into the near future. These events were listed along a 30-foot strip of paper running along the meeting-room wall.

Once the events were displayed, EPA's Robert Wolcott and WTTC's Geoffrey Lipman took participants on a " walking tour" of these events, highlighting those that have been most influential. Common trends between tourism development and the environmental protection became apparent through this process. The group's feedback and discussion were recorded on flipcharts by category. This is detailed in the timeline section on page 10 of this report.

Timeline diagram with "Tourism" and "Environment" rows marked along years 1950, 1970, 1980, 1990, 2000, 2010.

Vision, Driver and Barrier Analysis

A primary focus of the Roundtable was to conduct an analysis of the drivers or incentives and barriers or impediments to the Travel and Tourism Industry working towards environmental sustainability. In addition, in order to establish what are the drivers and barriers it was also necessary to establish what would be that "ideal" or vision that the industry should work towards within sustainability.

Through a process of synthesizing group activities a common vision was established representative of the needs of each area represented at the Roundtable. Common drivers and barriers were also decided upon. The results of these exercises are explained within this report.

Preliminary Actions

Once the participants established where the industry is at present and which direction it should continue towards through the Vision, Driver and Barrier Analysis. A set of preliminary actions was developed.

Steering Committee Role

Throughout the planning process for the Roundtable a small group of volunteers served as a steering committee. This group with the addition of several new volunteers will continue to assist EPA and WTTC throughout the next stages of the Roundtable process.

A feedback form has been developed and included in this meeting summary to elicit input from participants and interested parties prior to any actions being taken.

EPA Sustainable Industry Program: Knowledge and Cooperation for Better Environmental Protection

The Sustainable Industry Program provides a new approach for EPA policy development. It is based on the premise that by studying an industry in close cooperation with its decision-makers, we gain a better understanding of the sometimes not-so-apparent reasons why businesses embrace or resist actions to protect the environment.

Once we know why business decisions are made in an industry sector, EPA can then shape policies that take advantage of incentives for exceptional performance and overcome obstacles to success. The result is an agenda -- for government, industry, and others -- leading to long-term environmental improvement by businesses acting in their own self-interest.

The EPA Office of Policy Development's Industry Sector Policy Division begins by identifying industry sectors that offer substantial opportunities for further progress in cutting pollution impacts. The mission is to help industry sectors improve environmental performance while easing the costs and burdens of regulation. If a sector is well-represented by trade associations and shows interest in technical and management innovations, then it is a promising candidate for a Sustainable Industry partnership. We work cooperatively with selected industry sectors to develop smarter EPA policies that lead to cleaner, cheaper environmental protection by government and industry.

Once we form a partnership, EPA and business people join forces with community groups, environmental organizations, and other government agencies to study all aspects of the sector's decision-making that affect its environmental performance. Together we look for solutions to problems. Businesses and government test promising ideas in pilot projects and stakeholders evaluate the results. If the innovations prove to be workable and effective, we work for their adoption.

To date, EPA has identified six sectors, including travel and tourism, and environmental technology across these sectors. Sector goals follow:

- Learn the traits & trends, drivers & barriers that influence environmental protection decisions

- Develop and test new approaches that address the drivers and barriers -- modified regulations, new voluntary programs, R&D assistance

- Move forward with sector solutions that improve the environment, make business sense, are supported by stakeholders, can be adopted by governments

- Change EPA policies and procedures to "institutionalize" what works well

Industry changes might come in the form of better management practices or new technologies. Changes by government could be revised rules, a shift from

regulations to voluntary programs, streamlined process requirements, or any other way to get better results.

Benefits of participation include the following:

- Better working relations between industry, government (all levels), and interest groups. Constructive dialogue builds trust.

- Better knowledge of the industries and the views of those who work in or with them. Sharing perspectives and ideas leads to greater understanding of opportunities.

- Partnership in solving problems. Test new approaches, new tools and technologies.

- Smarter programs that achieve cleaner and cheaper results. More effective environmental protection with less oversight.

EPA will assess the environmental scope of the travel and tourism industry, including improvement opportunities in energy use, waste generation, air pollution, water use and other possible impact areas.

Why should EPA care about the travel and tourism sector?

Travel and tourism has significant environmental impacts but also contributes enormously to international, national and local economies for example:

- Largest and fastest growing sector in world;

- In the U.S., $550billion annual expenditures; third in retail sales behind automobiles and food and $26 billion trade surplus

- First or second largest employer in 19 states.

However, travel and tourism is not necessarily as clean and green as has been assumed. Draft figures indicate that the industry uses in the aggregate: 93.9 billion gallons water/year, 72.1 Gwhours/year, and generates 7.1 million tons of municipal solid waste per year.

The industry and stakeholders have demonstrated interest to work with EPA due in part to inherent link between sustainable growth of the industry and environmental protection.

Working initially with Mountain Resorts and a Sustainable Tourism Industry Roundtable leadership group, EPA will conduct driver/barrier analysis and assemble industry leaders to assess improvement options. The Roundtable is one stage in this process.

For further information, see brochure included with this report or contact Bob Benson, Director, Industry Sector Policy Division (2128), EPA Office of Policy Development, 401 M St., SW, Washington, DC 20460. 202 260-8668 benson.robert@epa.gov www.epa.gov/sustainable industry

WTTC Millennium Vision

The Rio Earth Summit identified Travel & Tourism as one of the key sectors of the economy that could make a positive contribution to achieving sustainable development.

There is no disputing that the world's largest industry has a substantial and growing environmental impact. However, it is an industry that has the possibility to manage its growth and resource-utilization patterns. Moreover, because of its unparalleled global communications channels, it can send powerful messages to the marketplace to influence consumer awareness and behavior.

There are a number of fundamental realities that make it important for this sector to take a leadership role.

- ☐ Travel & Tourism's universal involvement in the physical and cultural environment.
- ☐ Strong growth and increasing global spread - including, sensitive areas.
- ☐ International environmental policy momentum such as the Kyoto Convention.
- ☐ Growing- public awareness of the issues, the impacts and the stakes.

There has been a steady growth in good practices across the industry in recent years - airlines and airports reduce pollution and noise impacts; cruise lines practice marine conservation; hotels attack energy and waste; car rental companies invest in increasingly fuel efficient fleets and railways sound proof to dampen noise.

The new millennium challenge is to move from *ad hoc* to a more systematic approach, and in the process, change the culture in the private sector, the public sector and the market from reactive to proactive. The following principles are relevant:

Integration of Travel & Tourism policy into broader government policies, especially the environment.

Incentives to be developed for the Travel & Tourism industry to adapt to new ideals backed up where necessary by effective regulation developed in partnership with the industry.

Infrastructure planned and developed with a long-term view and within a reference framework based on Agenda 21.

Indicators and environmental impact assessment tools to enable effective local management and appropriate development.

Innovation of both process and application throughout Travel & Tourism by the use of new technology, environmental training- and consumer commitment.

International branding and certification, via the GREEN GLOBE program to improve standards and increase public awareness.

As a contribution to this process, we have advanced action on three interrelated fronts.

At a policy level: promoting, the concepts contained in **Agenda 21 for Travel & Tourism**, together with our partners the World Tourism Organization and the Earth Council. The message of the public and private joint action contained in the document was delivered to the UN Special Assembly. Later, the second regional

Think Tank was held in Indonesia and added positive elements to the evolving global vision as well as identifying issues relative to its application in Asia. We intend to continue this process with further Think Tanks in the Caribbean and Southern Africa in the coming months, involving regional organizations and all other stakeholders.

At a practical level strengthening the GREEN GLOBE program.

For *corporations*, through improved guidance material and creation of a certification process with the world leader, SGS. This will link with both ISO standards and Agenda 21 principles - the first certification has commenced with a group of hotels in Jamaica.

For *destinations*, through completion of a model program in Jersey resulting in the island becoming the first GREEN GLOBE Destination. Three pilot destinations were initiated in the Philippines with support from the UNDP and the Department of Tourism. Vilamoura in Portugal and Dominica in the Caribbean also entered the Destination program.

For the *public*, by promoting the global brand as a primary standard of environmental commitment. During the year, important alliances were concluded with the International Hotel and Restaurant Association and the International Hotels Environment Initiative that included support for the GREEN GLOBE program.

At an information level: ECONETT, the EU sponsored website has been upgraded and its document base extended. It is increasingly recognized as a focal point for environmental information, good practice, new techniques and technologies.

Agenda 21 Implementation Key Conclusions to Date:

The Think Tanks held in London and Jakarta produced the following ideas:

- Agenda 21 for the Travel & Tourism Industry can provide sound direction. It should be widely distributed as the core document

- Closer cooperation is required and should be stimulated between the public and private sectors: voluntary action is preferable to regulation, but some degree of regulation is necessary in areas such as land-use, waste management, etc.

- There should be more measurement of progress towards environmental goals.

- Infrastructure expansion is critical to the achievement of sustainable tourism.

- Environmental taxes, where applied, should be fair and nondiscriminatory. They should be carefully thought through to minimize their impact on economic development and revenues must be allocated to Travel & Tourism - associated environment improvement programs.

- International, national and local funding bodies should include sustainable development as part of their criteria, so that in time, all funding would be dependent on sound environmental practice.

- Contemporary research into sustainable development should be factored into the Agenda 21 for Travel & Tourism program. Issues requiring increased attention include design, carrying capacity and tour operator activities.

For information, contact Geoffrey Lipman, World Travel and Tourism Council, 20 Grosvenor Place, London SW1X 7TT, United Kingdom, tel: 44 171 838 9400, fax: 44 171 838 9050

Timeline Activity

The first participatory activity of the Roundtable was the creation of a timeline. Participants identified key historical moments in both the growths of the tourism industry and the environmental movement. These were posted on a large horizontal timeline. After participants had completed this task the results were discussed as a group and the following historical patterns and influencing factors involving the environment and tourism were identified:

- Demographic changes influence the market

- Mass tourism growing since 1950's

- Communication advances fuel growth in tourism (international faxing for instance)

- Air transportation grows dramatically

- Decision-making is more and more influenced by resource constraints driven by money

- Economic liberalization opens world

- Government "reinvents" itself and considers alternatives to regulation such as voluntary approaches and partnership programs

- Urban flight drives population away from city centers

- New attitude in young people, youth becomes an empowered constituent to a certain extent

- Growth in information technology

- International meetings and conventions pave the way, but words and actions do not match yet

- Destinations are developed to capture niche markets

These patterns and factors were synthesized into the following issues shared by of the environmental movement and the tourism industry:

- Interest in ecosystem health, no one wants to pay to go to a dirty or polluted destination.

- Transport causes congestion and air pollution but is essential for people to get to their destinations.

- Airplanes and automobiles are integral to both tourism development and environmental protection.

- Indigenous people matter and become focal point on environmental issues and in particular geographic locations.

- Youth are impressionable; they are an opinion force; tourism and environment want youth on their side

- Energy crisis as a major turning point in both movements in prompting concern and a necessity for energy efficiency and conservation.

- Regulations in some cases have a biological/ecological basis.

- Urban sprawl, development that happens too fast and too much, constitutes a concern for both tourism and environment.

- Technology innovation can promote improved environmental quality.

- Environmental quality is good for business, deteriorated environment, like polluted beaches, is bad for business (building on the inherent incentive in tourism to protect the natural resource base).

- Understanding and publicizing the link between tourism and the environment can prove to be a powerful educational tool

- Travel and tourism will influence the shape of our economic, environmental and social future; strategic management is critical to environment and tourism.

- Government has a role to play in tourism policy; tourism should be a strategic priority

- Sustainable development offers an excellent conceptual framework for tourism and the environment.

- Jobs and development (national and international); every country has an opportunity to develop sustainable tourism and provide jobs.

- "Valuing" the unique assets of places.

- Special concerns of community impacts, especially small communities.

- The concept of regional self-sufficiency can provide insight about "good practice" for sustainable tourism
.
- Education and training are valuable and necessary tools and the special needs and concerns of indigenous people should be recognized.

- Public/private partnerships present good opportunities to advance sustainable tourism.

- Increasingly, international interdependence is recognized in both environmental matters (e.g., climate, ozone) and tourism development and market

- There is an increasing need to establish credibility and accountability; are we doing what we say we are doing and can that be verified some way.

- The industrial revolution changed the face of tourism and the extent and speed at which human activity can impact the environment.

The following opportunities to integrate tourism and the environment were recognized:

- Job creation potential.

- Intergenerational transfer of wealth.

- Shared infrastructure.

- Need for accountability (ensuring that we "walk the talk")

- Enhanced transportation systems, especially cars and planes.

- Development of private voluntary standards.

- Economic growth and investment potential.

- Management of protected areas.

- Information, communication and education as integrated tools.

- Energy conservation potential.

- Agricultural linkages and agrobusiness development (ex. ecotourism).

- Using the concept of "carrying capacity" to ascertain how much of something is sustainable.

- Water conservation potential

- Market advantage and positioning.

- Improved intergovernmental coordination

- Third party certification and ratings to enhance consumer protection.

- Measurable growth in travel and tourism opportunities which positively enhance the net asset (economic, social, environmental) value of tourism destinations and their accessibility.

Vision, Driver and Barrier Analysis

The next participatory activity of the Roundtable was an analysis of drivers, barriers and a vision for the Travel and Tourism Industry in general.

What is a Driver?

Drivers, or incentives, are factors that encourage firms to make environmental progress in their operations. These might include:

•   Cost Savings

•   Market Advantage

•   Reputation Enhancement

What is a Barrier?

Barriers, or impediments, are things that make it difficult for firms to act in an environmentally sustainable manner, such as:

•   Lack of technologies or investment capital.

•   Regulations that stifle innovation.

•   Outdated business practices.

What is a Vision?

A vision in this sense is the "ideal" to work towards. Once a common vision is established it is then possible to address those issues and design those activities needed to achieve the ideal.

Step One: Identification of Barriers, Drivers and Vision

The first stage of this process intended to identify where the Travel and Tourism Industry is with regard to the environment at present; where it should be and how to get there. This was accomplished through a series of synthesizing activities.

Initially, participants were asked to complete a "poster" for their individual organization. The poster included their organization's future vision with regard to the environment, as well as identified the barriers and drivers to achieving this vision.

Note: If an organization was not able to attend the Roundtable we encourage them to complete the blank poster provided with this report and submit with any comments desired.

My Organization:
Marriott

Vision:
An environmentally conscious hospitality organization

Barriers:
Cost in money, Cost in effort, Cost in manpower, Customer participation, Minimalist approach to issues of "consciousness"

Drivers:
Image of a global "good citizen"/Reputation enhancement, Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction, *Being* a global "good citizen"

My Organization:
World Travel and Tourism Council

Vision:
Industry (supply) and consumers (demand); Recognize and act on Agenda 21 for travel and tourism principles.

Barriers:
Cost in Money, Lack of data/Information gaps/Awareness, Competition, Duplication/ Overlapping efforts

Drivers:
Growing market for type of facility/Growing market interest, Being a global "good citizen"

My Organization:
Patagonia

Vision:
To save/promote wild areas and reduce corporate impacts.

Barriers:
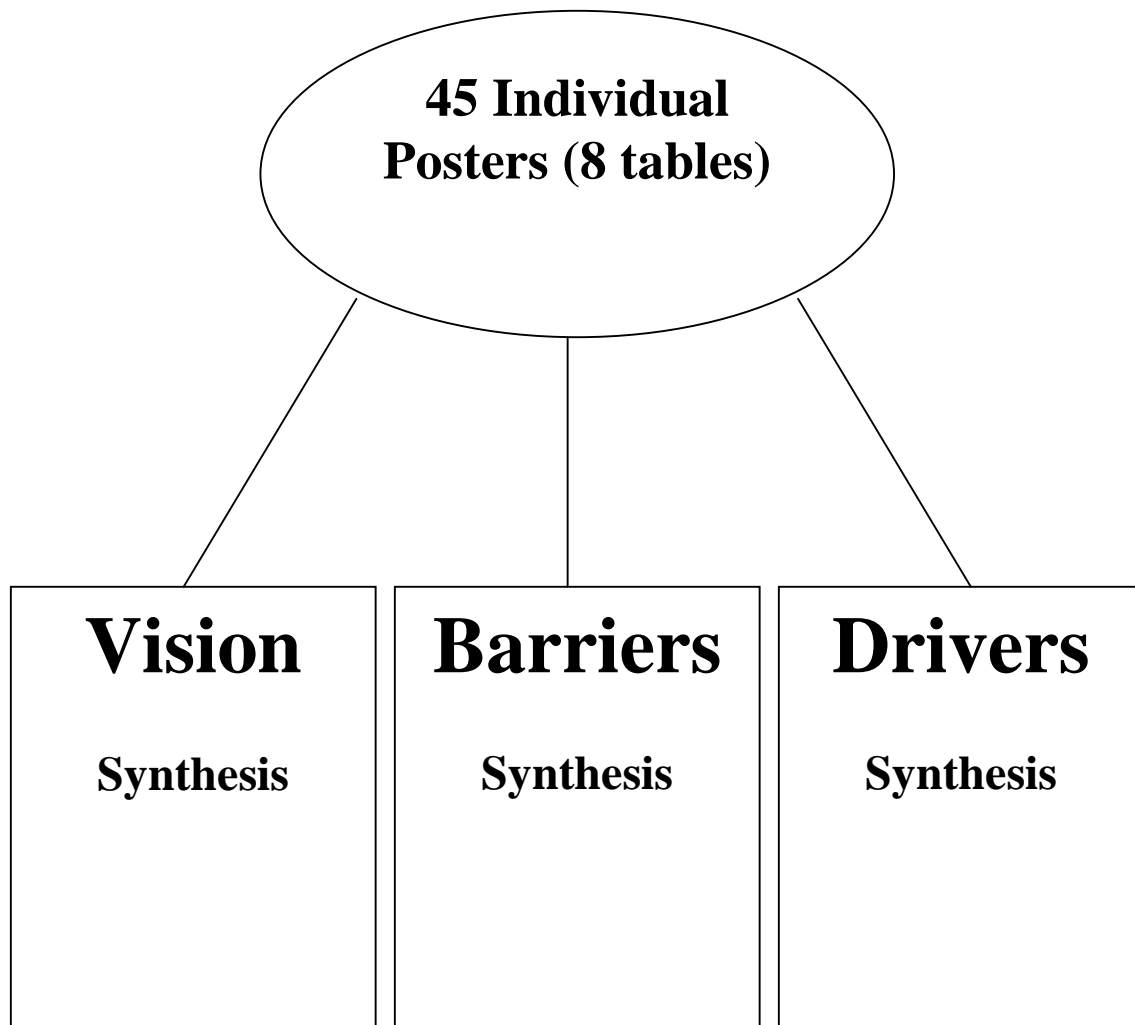Uncontrolled development/High impact natural resource usage

Drivers:
Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction

Step Two: Synthesizing of Individual Posters into Common Drivers, Barriers and Vision

After the initial posters were created, each participant joined one of eight tables. Each table then combined and synthesized their individual barriers, drivers and vision into a common group of ideas. Upon completion, each table had one poster for each of these concepts representative of the overall needs of the group. The result was eight sets of drivers, barriers and vision posters.

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       (   Posters (8 tables)     )
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┌──────────┐ ┌──────────┐ ┌──────────┐
│ Vision   │ │ Barriers │ │ Drivers  │
│          │ │          │ │          │
│ Synthesis│ │ Synthesis│ │ Synthesis│
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Step Three: Development of an Overall Set of Drivers, Barriers and Vision for the Travel and Tourism Industry

The final step of this process further synthesized the eight sets of group posters into one poster for each concept. These were then individually presented to the entire group. The results of these exercises are explained in the following sections.

Vision

As part of the synthesis exercise, a common vision or guideline for future development with the Travel and Tourism Industry with regard to environmental sustainability was established. The participants identified a singular vision which is as follows:

The travel and tourism industry becomes a world leader and exemplary sustainable industry by working together with all stakeholders to balance economic development, social well being, and environmental stewardship.

Fulfillment of this vision is expected to result in the following outcomes:

- Improved environmental performance is a core value and management commitment of the travel & tourism industry

- Stakeholders (consumers, businesses, non-profit organizations and governments) increasingly understand, respect and practice responsible environmental protection and stewardship.

- Environmental goals and actions are integrated into all business operations

- Measurable growth in travel and tourism opportunities which positively enhance the net asset (economic, social, environmental) value of tourism destinations and their accessibility.

Drivers

Participants initially identified the following drivers that can be categorized into five main areas:

1. Environmental Protection
- Movement toward sustainability
- Decreasing environmental quality heighten the message
- Sustainability contributes to a stronger sense of place (local quality of life)
- Improved environmental quality
- Protection of environment is in and of itself a driver
- Genuine concern for environment

2. Reputation Enhancement
- Public relations, "selling the environment is good business"
- Good will/social responsibility
- Awards
- Peer Pressure

3. Market Advantage
- Market/consumer demand
- Consumer awareness is increasing, demand is growing for sustainability
- Large and growing market for places that are environmentally responsible
- Job creation
- Quantity of travel experiences

4. Cost Savings/Gain
- Exports and jobs
- Opportunities for public private partnerships
- Tourism can be economic development; it is a viable export
- Availability of technology
- Bottom line savings (longer term)
- Potential reduction in operating costs
- Perceived market advantage – new market segments and opportunities for wealth creation

5. Regulations
- Regulatory relief
- Non-punitive government approaches where government is willing to learn can lead to a proactive industry

Drivers/Incentives

Through group discussion, the following synthesis of drivers emerged:

- Corporate environmental ethic and image

- Market advantages, perceived and actual

- Creation of positive travel experiences

- Scarce local resources can stimulate conservation

- Ecosystem protection secures a viable and high quality tourism "product"

- Need to consider the different incentives for different sectors within the industry, for instance, certain incentives may work for business travel that may not be as effective for leisure travel

- Potential reduction in operating costs (short and long term)

- Opportunities for new wealth generation including small scales testing of new ideas

- Consumer and market demand

- Profit motive

Certain drivers are available and most appropriate for government. These may be considered regulatory incentives such as:

- technology development and information
- environmental cost accounting tools
- creating markets (e.g. waste from one place or sector can be a raw materials somewhere else)
- subsidization or redirecting subsidies to new types of public/private partnerships
- Research and development programs to meet cross cutting needs
- Influence consumer demand through education and experiential learning
- Supplier-vendor incentives; it's a two way street
- Local interests/partnerships – harness tourism in a unique place; local involvement in support of tourism "products"

Barriers

Participants initially identified the following barriers:

☐ Lack of Clarity/Purpose

☐ Multiple, often conflicting environmental initiatives

☐ Conflicting goals

☐ Unclear regulatory standards, multiple interpretations that don't always promote best action

☐ Limited Resources

☐ Limited corporate resources to do sustainability

☐ Funding constraints

☐ Accounting/Cost Benefit Ratios

☐ Difficult capital investment decisions/uncertain returns

☐ Balance of costs vs. benefits

☐ Sustainable/pollution prevention practices are labor intensive

☐ Access to technology

☐ Engineering Infrastructure

☐ Institutional Culture

Through group discussion, the following synthesis of barriers emerged:

☐ Lack of awareness and information for community, consumer and industry. This is linked to management and training barriers

☐ Cost – in terms of 1) time and staff, and 2) short term and long term. The cost barriers include both lack of funding/venture capital and of social costs

☐ Access to basic and advanced infrastructure/technical/engineering resources

☐ Specific community concerns (ex. traffic congestion)

☐ Lack of community recognition of tourism benefits and responsibilities

☐ Lack of innovative leadership that is locally responsive

☐ Lack of respect and responsiveness to unique community situations

☐ Inefficient (and sometimes ambiguous and conflicting) regulations

☐ Lack of trust among consumers, government and industry; this is linked to apathy and/or antagonism

♦ Fragmentation/competition/diversity of the travel and tourism industry

♦ Limits of carrying capacity - knowing when to say enough

Barriers/ Impediments

Preliminary Actions

The Roundtable participants stressed the need to develop a clear sense of direction and concrete follow-through actions. Preliminary actions identified toward the conclusion of the Roundtable follow:

- Study actual and potential benefits to be gained by Indian tribes from travel and tourism, including the protection of indigenous lands and resources.

- Document compelling business reasons to support environment initiatives.

- Determine the role of environmental NGOs.

- Define environmental issues, which are directly related to the travel and tourism sector.

- Identify what the private sector needs to do to improve environmental performance.

- Identify the role of EPA and related governmental agencies with reference to the travel and tourism industry.

- Presentation of best practices, technical information, proactive ideas and training programs to encourage sustainable tourism, e.g., indigenous self-determination/self governance (local control of resources); improved environmental management of concession operations (e.g., National Park and Forest Recreation Systems), ecotourism products and market niches, green labeling and certification programs (e.g., GREEN GLOBE/Green Seal).

- Integration of Internet web sites and portals related to improved environmental performance and sustainable tourism industry practices

- Coordination of Abt industry analysis with US Department of Commerce and WTTC data sources, with distribution of Abt report for comment to Roundtable participants.

Steering Group Role

During the initial planning of the Roundtable a Steering Group provided input with regard to the Roundtable process. A complete list of Roundtable Participants can be found in Annex G. The steering committee will be joined by the following volunteers to review the draft Report, and propose action steps for consideration by the larger group.

Steering Group Members:

Ginger Smith, Hagler Bailly
Argyle Reed, Marriott Corporation
Jonathan Tourtellot, National Geographic Traveler
Mark Petruzzi, Green Seal
Julie Kutner, WTTC
Scott Wayne, WTTC
Donald E. Hawkins, GWU
Robert Sachs, EPA
Julie Frieder, EPA

Volunteers

Lisa Burcham, National Trust
Ed Sanders, Ecotourism Solutions
Bob Yearout, USNPS
Denny Buschor, USFS

Next, steps for the Steering Committee identified by the Roundtable participants follow:

1. Review vision.

2. Formulate goals and possible action steps

3. Clarify definitions, industry scope and impacts, drivers and barriers.

4. Formulate organizational options, for example: form a coalition or council on sustainable tourism.

5. Establish criteria for setting priorities and obtaining necessary funding.

6. Formulate assessment processes.

7. Plan next steps: Follow-up Roundtable, other actions

8. Review draft Roundtable Report based upon feedback from participants and interested parties

9. Canvas other organizations expressing interest or which represent key stakeholders to gain their input

10. Incorporate feedback into Roundtable Final Report by the end of March 1999.

Appendix A

Participants List / Interested Parties List

Name	Salutation	Title	Company	Address	Tele	Fa
Adam Burke	Adam	Senior Analyst	AbT Associates	Cambridge, MA	617-349-2774	
Scott Belcher	Scott	Managing Director, Environmental Affairs	Air Transport Association	1301 Pennsylvania Ave, NW Suite 100 Washington, DC 20004	202 626 4155	202-626-4139
Robert Elliott	Robert	Director of Regulatory Affairs	American Hotel & Motel Association	1201 New York Ave, Suite 600 Washington, DC 20005	202 289 3190	202-289-3185
Paul Ylvisaker	Paul		Aramark Corporation	1101 Market Street Philadelphia, PA 19107	215-238-3962	215-238-3736
Carter Morris	Carter	Director, Environmental Affairs	Association of American Airport Executives	4212 King St Alexandria, VA	703-824-0504	703 820 1395
Rose Pullino	Rose	Director, Environmental Affairs	Avis Rent a Car Systems	900 Old Country Road Garden City, NY 11530	1-516-222-3838	1-516-222-66
Thomas Polski	Thomas	Chief Public Relations Officer	Carlson Hospitality Worldwide	Carlson Parkway P.O. Box 59159 Minneapolis, MN 55459-8215	1-612—540-5616	1-612-449-12
James Walsh	James	Environmental Director	Carnival Cruise Lines	3655 NW 87th Avenue Miami, FL 33178-2428	1-305-599-2600	1-305-406-86
Pam Rubinoff	Pam	Coastal Resources Center	Coastal Resources Center University of Rhode Island	Narrangansett, RI 02882	401 874 6135	
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Jamie Sweeting	Jamie	Manager, Ecotourism Program, Conservation Enterprise Dept.	Conservation International	2501 M St., NW, Suite 200 Washington DC 200037	(202)429-5660;	(202)331-932
Norman Fast	Norman	President	Conservation Tourism, Ltd.	49 Walnut Street, Building 2 Wellesley Hills MA 02481	781 239-3626	781 239 3610
Suzy Hubell	Suzy	Deputy Director of External Affairs	Department of Interior External Affairs	1849 C St. NW Mail Stop 6214 Washington DC 20240	202-208-1923	202-208-1821

Elizabeth Bell	Elizabeth	Senior Advisor	Department of Interior, Bureau of Indian Affairs	1849 C Street, NW Washington, DC 20120	202-208-7163	
Edward Sanders	Ed	President	Ecotourism International	7013 Holyrood Dr. McLean, VA 22101	703 790 3353 970 544 6614	703 790 3354
Julie Frieder	Julie		EPA Industry Sector Policy Division	401 M St. SW Washington DC 20460	202-260-1088	
Bob Sachs	Bob	Program Manager	EPA Industry Sector Policy Division	401 M St. SW Washington DC 20460	202 260 2765	202 401 0454
Maryann Froehlich	Maryann	Director, Office of Policy Development	EPA Office of Policy Development	401 M St. SW Washington DC 20460	202 260 4034	202 260 0780
Robert Benson	Bob	Director, Industry Sector Policy Division	EPA Office of Policy Development	401 M St. SW Washington DC 20460	202-260-8668	
Robert Wolcott	Rob	Deputy Assistant Administrator	EPA Office of Policy Development	401 M St. SW Washington DC 20460		
Russ Clark	Russ	Analyst	EPA Pollution Prevention Division	401 M St. SW Washington DC 20460	202-260-4418	202-260-0178
Mark Petruzzi	Mark	Director Certification	Green Seal	1400 16th St. NW Washington, DC 20036-2215	**202 558 8400 ext 23**	202 588 8465
Ginger Smith	Ginger	Sustainable Tourism Development Consultant	Hagler Bailly	2094 Van Tuvl Place Falls Church, VA 22043	703 532 0085	202 994 1630
Jeanelle Blanchard	Jeanelle	Associate	Haigler Bailly Services, Inc	1530 Wilson Blvd Arlington, VA 22209-2406	703-312-9841	703-351-6166
Peter J. Illig	Peter	Consultant	Holland & Knight LLP	2000 K Street, NW, Suite 200 Washington, DC 20006	(202) 828-1888	(202) 828- 18
James Schaarsmith	James	Senior Consultant	Holland & Knight LLP	2000 K Street, NW, Suite 200 Washington, DC 20006		(202) 828- 18
Randy Davis	Randy	Environmental Programs	International Association of Amusement Parks and Attractions	1448 Duke St. Alexandria, VA 22314	703 836 4800	703 836 4801

Craig Sholley	Craig	Director of Conservation & Education	International Expeditions	13540 Route 108 Highland, MD 20777	301 854 3096	301 854 3096
Donald Hawkins	Don	Director	International Institute of Tourism Studies/GWU	The George Washington Univeristy 2206 I St. NW Washington, DC 20037	202 994 7087	202 994 1630
Scott Johnson	Scott	Senior Marketing Research Analyst	International Trade Administration – Tourism Industries	US Department of Commerce Washington, DC 20052	202 482 1129	202 482 2887
Stanley Selengut	Stanley	President	Maho Bay, Inc	17 East 73rd St. New York, NY 10021	212 472 9453	212 861 6210
Argyle Reed	Argyle	Environmental Projects	Marriott Corporation	1 Marriott Dr. Dept. 93220 Washington, DC 20058		301 380 7740
Jonathan Tourtellot	Jonathan	Senior Articles Editor	National Geographic Traveler	1145 17th St. NW Washington, DC 20036	202 857 7349	202 429 5712
Lisa Burcham	Lisa	Senior Program Associate	National Trust for Historic Preservation	1785 Massachusetts Ave, NW Washington, DC 20036	202-588-6000	202-588-622?
Miranda Harris	Miranda	Physical Scientist	NOAA	3908 McKinley St. NW Washington DC 20015	(301)713-3000 ext. 177	301-713-438?
Todd Davidson	Todd	Executive Director	Oregon Tourism Commission	775 Summer Street, NE Salem, Oregon 97310	503-986-0007	503-986-0001
Eric Wilmanns	Eric	Director of Environmental R&D	Patagonia	PO Box 150 Ventura, CA 93002-0150	805-667-4562	
Nancy Wheatley, Sr	Nancy	Senior VP, Safety & Environment	Royal Caribbean Cruises Ltd.	1050 Caribbean Way Miami, FL 33132	305-982-2468	305-539-6478
Chris Holtz	Chris	College Professor	Sustainable Tourism Consultant/GWU Instructor	119 Maywood Ave Charlottescille, VA 22903	804-295-7642	804-295-7642
Destry Jarvis	Destry	Assistant Director	U.S. National Park Service	1849 C St. NW Room 3122 Washington DC 20240	202-208-6781	202-273-089?
Bob Yearout	Bob	Chief Office of Concessions	U.S. National Park Service	1849 C St. NW Room 3122 Washington DC 20240		

Floyd Thompson	Floyd	National Program Leader- Recreation and Tourism	US Forest Service	USDA Forest Service Auditors Building, 4th Floor 14th and Independence Ave, Washingtonn, DC 20250	205-1423	205-1125
Steve Yaddoff	Steve	Deputy Director	USDA Forest Service State and Private Forests	201 14th street Washington DC 20013	202-205-1657	202-205-1174
Aubrey King	Aubrey	Advisor	Western States Tourism Policy Council	1156 Fifteenth Street, NW Suite 505 Washington, DC 20005	202-659-2979	202-659-3020
Geoffrey Lipman	Geoffrey	President	World Travel and Tourism Council	P.O. Box 396 Linton, Cambridge C81 6UL UK		
Scott Wayne	Scott	Special Advisor to the President	World Travel and Tourism Council	2020 Pennsylvania Ave Washington, DC 20006	202 463 7394	202-463-7393
Julie Kutner	Julie	Director, Americas	World Travel and Tourism Council	8042 Glendale Road Chevy Chase Md 20815	301-656-0414	(301) 656 912
Barry Spergal	Barry	Conservation Finance Program	World Wildlife Fund	1250 24th St, NW Washington, DC 20037-1175	202-778-9655	202.861.8324

Appendix B

Roundtable Participant Packet

EPA WTTC

Environmental Protection Agency   World Travel and Tourism Council

Sustainable Tourism Roundtable
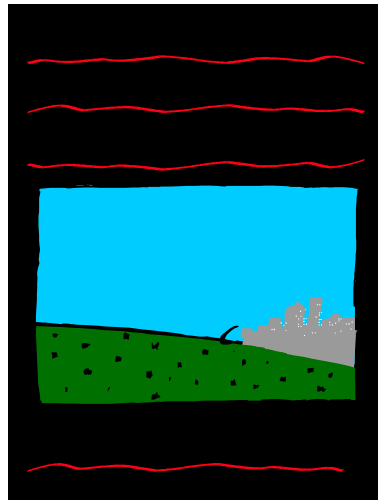
December 8, 1998 at The George Washington University

Participant Packet

Objectives

To think strategically about a vision and
action steps for environmentally-friendly tourism

To discuss ways EPA and the industry can
work in partnership

To explore the establishment of a standing
leadership group

Overview

Agenda

This will be a participatory meeting. You will be involved in several activities designed to maximize participant input and collaboration. These will include:

9:30 - **Arrival** - Signing-in

10:00 - **Welcome** - Dr. Donald Hawkins

10:05 - **Greetings** - Geoffrey Lipman, Rob Wolcott

10:15 - **Introductions**

10:25 - **Overview** - Richard Brown

10:45 - **Timeline** of Tourism and the Environment

11:15 - **Presentations**
WTTC - Geoffrey Lipman
Sustainable Industry - Bob Benson
AbT Associates - Adam Burke

11:45 - **Organizational Perspective** - Individual poster creation

12:00 - Lunch - **Visit posters** & post questions

12:45 - **Discussion** at tables - each group creates 3 posters:
      - *vision for sustainable tourism*
      - *barriers*
      - *incentives*

1:30 - **Synthesis** -- Participants shift to new tables for the three topics:
      - vision table
      - barrier table
      - incentive table

2:15 - **Break**

2:30 - **Plenary Validation**

      - Vision, barriers, incentives presentations & discussion
      - Actions discussion
      - next steps

4:00 - **Reception**

Ground Rules
Short contributions to discussion (30 seconds maximum)
Everyone is responsible for success
Disturbances have priority
Put all key information on the wall
You enforce these ground rules

Timeline Exercise

What's a timeline?

A horizontal strip of time -- you will write key events on cards and post them on the timeline.

Then, Geoffrey and Rob will take us on a guided walking tour of the history of tourism and the environment.

As they are giving us our tour, we'll note trends, shared issues, and opportunities to integrate tourism and the environment.

Tourism

| 1950 | 1960 | 1970 | 1980 | 1990 | 2000 |
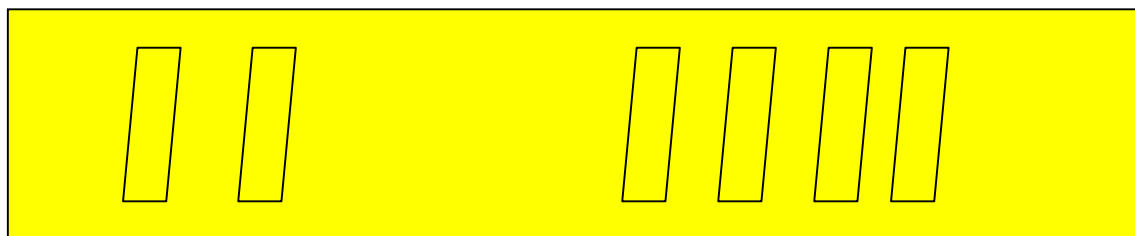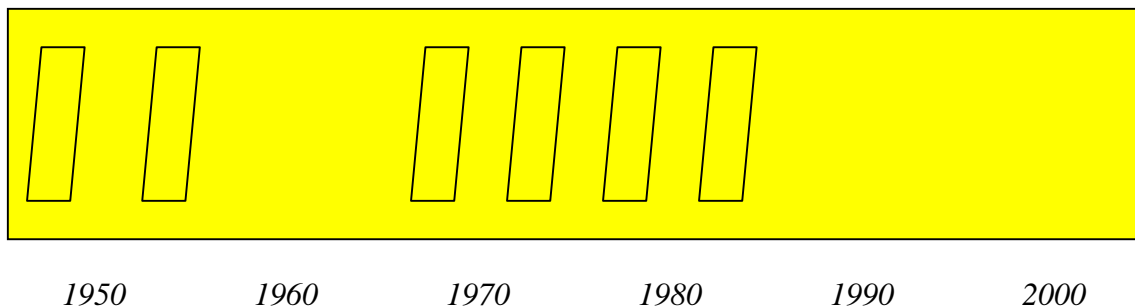
The Environment

Organizational Perspective

Creating Your Poster

Participants from each firm or organization will be asked to create a poster about their organization and the environment. Posters will address their organization's vision for working with the environment, barriers to realizing that vision, and incentives for realizing it.

Your poster will be hung on the wall.

Lunch, Poster Review and Posting Questions

You will take a self-guided tour around the room and visit each participant's poster. While there you will place a question-mark sticker on up to 5 posters if you need clarification. After lunch we'll get those questions answered.

My Organization:

Vision (or headline)

Barriers / Obstacles

Incentives / Drivers

My Organization:

Vision (or headline)

Barriers / Obstacles

Incentives / Drivers

Discussion Phase

Table work

You will take your poster to a table indicated by the color on your name tag. The group at your table will create 3 posters. The first will be on a vision of sustainable tourism for the industry from the individual posters you brought.
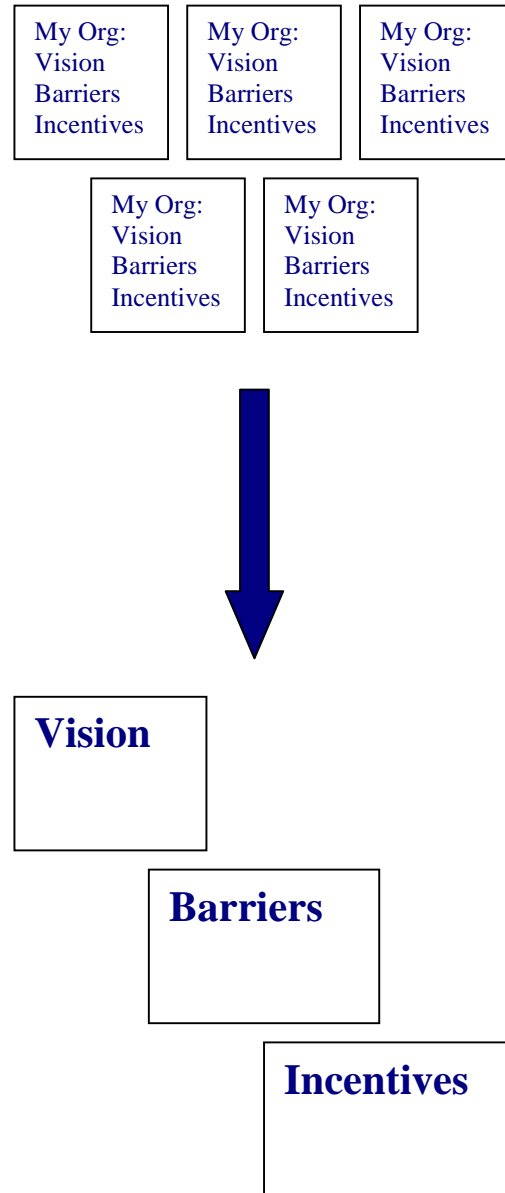
You will strive for a vision which evokes a picture in people's minds, is clearly a destination (not a way of getting there), and is a stretch, a bit outrageous.

Barriers / Obstacles

Your team will develop a second poster for the table (and the industry) on barriers to environmentally-responsible tourism. This might include forces, restraints, cost considerations, profit or cash flow, technical difficulties, information gaps, political/legal/regulatory considerations, and risk management problems.

Incentives / Drivers

The third poster will list incentives for sustainable tourism. You may speak to reasons for working toward environmental protection, ways to make more money (or spend less) by doing so, possible competitive advantage, and links to the industry's core values and decision-making factors.

My Org:
Vision
Barriers
Incentives

My Org:
Vision
Barriers
Incentives

My Org:
Vision
Barriers
Incentives

My Org:
Vision
Barriers
Incentives

My Org:
Vision
Barriers
Incentives

Vision

Barriers

Incentives

Synthesis Phase

Each Discussion Table Will Send Representatives to Synthesis Tables for Vision, Barriers, or Incentives

You will take your Discussion Posters to one of three tables. There, you and representatives from other tables will synthesize the information you brought and the information on the individual posters around the room into a presentation on your topic.
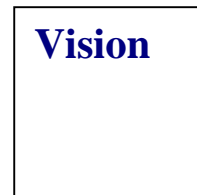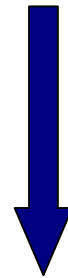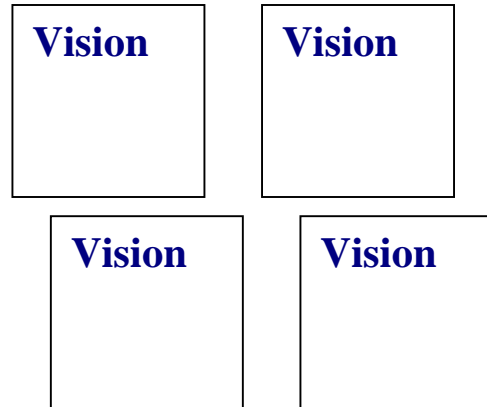
In doing so, you will ...

Discuss what your topic is about

Review the information in the room

Develop a shared picture

Prepare to present

Vision	Vision
Vision	Vision

Vision

Plenary Validation

Back together again ...

The Vision Synthesis Team will present it's conclusions. The entire group will discuss the topic, propose refinements, and work toward at least some sense of agreement on the direction presented.

Barriers

Will be presented by the Barrier Synthesis Team, followed by discussion.

Incentives / Drivers

Similarly, the Incentives/Drivers Synthesis Team will say what they think, and we'll talk about it.

Actions

The entire group will address the question, "What would need to be done to realize this vision, in light of the barriers and incentives?"

Next Steps

During the Meeting There
will be an action-planning board on which we
will capture next steps, commitments, and plans,
including short-term, mid-term, and long-term
actions.

After Plenary Validation We
will talk further about next steps, adding some
items and making sure the info on others is
complete and that they can be accomplished.

Task	Responsible	When

Appendix C

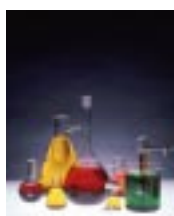EPA – Office of Policy Presentation

Sustainable Industry Program: Tourism and Recreation Sector

U.S. Environmental Protection Agency
Industry Sector Policy Division

December 1998

EPA's Industry Sector Policy Division
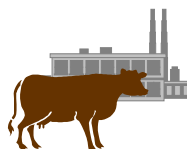### *Applying the Sustainable Industry Model (SI)*

Metal Finishing
(CSI Sector)

Common Sense Initiative

Metal Finishing Sector

Specialty/Batch Chemical Manufacturing
(N.J. Regional Project / Candidate Nat'l Sector)

Food Processing
(Meat Processing Subsector)

Tourism and Recreation *(Mountain Resort Subsector)*
Photoprocessing *(Code of Practice Project)*
Addressing Technology Barriers in Sectors

Sustainable Industry

A systematic "pipeline" -- a "life-span" process
for industrial sector-based programs.

A unique method to provide incentives/tools and
remove barriers to better environmental performance.

An "incubator" of new industry sectors,
feeding into established reinvention programs.

Sustainable Industry

A "Life Span" Approach to Sector Development

**Stage 1:
Sector Selection**

Flexible criteria

**Stage 2:
Sector Analysis**

Traits, trends, drivers & barriers

**Stage 3:
Project
Development**

*Test ideas in
pilot projects*

**Stage 4:
Program
Implementation**

*Pilots define
program changes*

**Stage 5:
Long-Term
Outcomes**

*Sector-specific
system changes*

Advantages of This Approach

Sustainable Industry

- Strong knowledge base -- unique analysis of sector traits, trends, drivers & barriers

- A firm foundation for project and policy development -- sector info leads to actions that hit key leverage points

- Stakeholder-driven process -- from issue definition to project development and goal-setting

- Systematic, yet flexible -- the process adds value, but can be tailored to meet stakeholder needs

- Greater knowledge leads to trust and consensus

CSI Metal Finishing: What Did the Industry Get Out of This?

Common Sense Initiative
CLEANER CHEAPER SMARTER
Metal Finishing Sector

- Greater understanding of the industry and its commitment to improved performance.

- Constructive, non-adversarial dialogue about industry issues and objectives.

- Public recognition as a proactive industry willing to test an innovative Goals Program.

- Tangible benefits from projects, tools, research and assistance programs, etc.

- Groundwork for less burdensome regulatory system that rewards top performers.

Tourism and Recreation Sector
(Destinations, services, activities)

Mountain Resorts Subsector

- •$450 billion industry, major job source
- •Climate, water & ecosystem issues
- •Input/output data show inefficiencies
- •Sector depends on a clean environment
- •Several interested stakeholder groups
- •*SI process will quantify impacts*

3-Part Workplan:
- • **Sustainable Industry Analysis for Mountain Resorts**
- • **Tourism and Recreation Sector Impact Analysis**
- • **Sector Stakeholder Roundtable**

Sustainable Industry

For more information, contact:

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Director, Industry Sector Policy Division
(202) 260-8668 Benson.robert@epa.gov

Bob Sachs
Program Manager, Tourism and Recreation Sector
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Julie Frieder
Program Manager, Tourism and Recreation Sector
(202) 260-1088 Frieder.julie@epa.gov

Appendix D

WTTC Millenium Vision Information

Millennium Vision Services

WTTC's Millennium Vision Services are programmes and activities designed to help governments, businesses, organisations and educational institutions maximize the benefits of Travel & Tourism. WTTC offers Services that assist with implementation of each "pillar" of the Millennium Vision:

1) Make Travel & Tourism a strategic economic and employment priority
- ***WTTC/WEFA Country Reports and Simulated Satellite Accounts****:*
Since 1995, WTTC and its research partner, the WEFA Group, have conducted <u>over 20 studies</u> at the request of countries, regional organisations and the US state of Hawaii that establish simulated satellite accounts for tourism. These studies are a business and macroeconomic policy "tool" that demonstrates the far-reaching impact and potential of Travel & Tourism on economies by quantifying the impact of the industry on the economy and employment of a nation or other political entity.

- ***Sector/Destination Reports***

This new customised service enables governments and the industry to more precisely measure economic impact on a sector and destination basis. In collaboration with PricewaterhouseCoopers, Arthur Andersens and other partners, these reports can address the direct and indirect economic benefits of an industry sector such as cruise lines, car rental agencies on a destination and hotels.

2)Move towards open and competitive markets
- ***Establishment of Destination Marketing Councils***
WTTC Destination Marketing Councils can assist countries with competing in a global marketplace.

- ***Airport privatisation*** *– In collaboration with PricewaterhouseCoopers, WTTC is exploring ways to facilitate this process around the world.*

3)Promote sustainable development
Industry and consumer awareness of the value of sustainable tourism development needs to be increased. Sustainable development is not fully recognised as an investment in most industries, including Travel & Tourism. WTTC's activities in this area of the Millennium Vision are directed at overcoming these challenges.

- ***GREEN GLOBE destinations*** *and certified hotels are being established worldwide based on global GREEN GLOBE standards, branding and marketing. The GREEN GLOBE programme represents a unique and cost-effective adaptation of ISO 14001 and 14000 environmental management systems standards for Travel & Tourism.*

- ***Customised Alliance for Sustainable Tourism web sites*** *are being offered to serve fast growing local interest in tourism that makes sense for the bottom line **and** the environment.*

- **"Return of the Dodo" cartoon series** helps educate travelers and their children in over 50 countries about tourism and the environment. WTTC has adopted the Dodo

character and collateral materials, including videos and educational materials, for use with the industry and young people.

4)Eliminate barriers to growth

■ **Human Resource Development**

Through its Human Resources Centre at Capilano College in Vancouver, Canada, WTTC is encouraging human resource development that helps prepares the Travel & Tourism workforce worldwide. The "Steps to Success" series of publications produced by the *Centre* provides valuable industry success stories from all sectors and regions of the world.

*WTTC's new partnership with *Reach & Teach*™ helps governments and the industry in developing countries overcome education and training obstacles. Namibia is the first target country for this partnership. The programme allows for an individual to develop their full potential in a career in the industry, as well as to develop the necessary skills and competencies for people to start their own small tourism related businesses.

■ **Taxation**

WTTC's tax policy work offers invaluable research and analysis to governments and the industry and, upon request, can offered to individual countries.

■ **Investment**

WTTC's new Business Climate reports that examine legal and regulatory conditions for tourism investment and operations are being developed with PricewaterhouseCoppers. Through its Millennium Vision with the World Bank Group, WTTC is exploring ways to promote this service in collaboration with the online investment information service of the Multilateral Investment Guarantee Agency

Millennium Vision Fund

To help finance the implementation of Millennium Vision Agreements in emerging economies, WTTC established the Millennium Vision Fund in 1998 with seed capital from WTTC member Hazy Investments. This initial funding is being used towards the financing of tourism development projects in Africa. It is intended for use with projects in other regions and in combination with additional sources of public and private financing. Launching of the Reach & Teach tourism education programme is being launched in Namibia with the assistance of the Fund.

Appendix E

Abt Report Presentation

Economic and Environmental Impact Analysis of Tourism and Recreation Industries

- ◆ **Scope**
- ◆ **Methodology**
- ◆ **Preliminary Findings**
- ◆ **Questions and Answers**

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Scope

Context

- ◆ **Part of EPA's sector-based approach**
- ◆ **Part of scoping and analysis of the characteristics, trends, drivers, barriers**
- ◆ **Will eventually help in developing pilot projects**
- ◆ **Baseline**

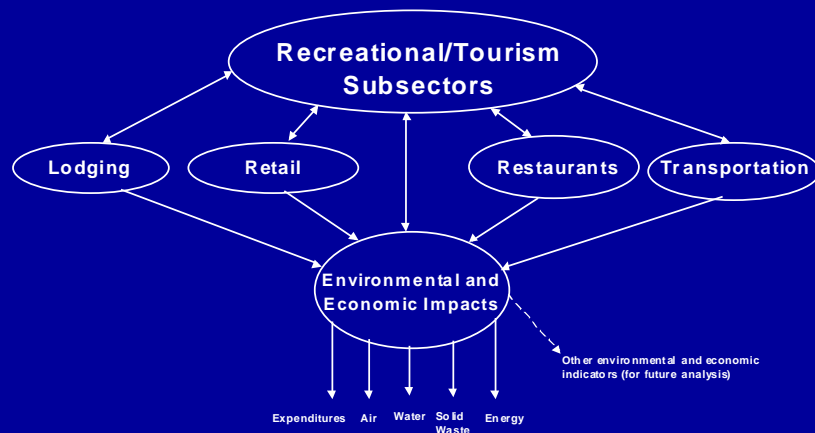December 8, 1998   2

Initially, Economic and Environmental Impacts are Quantified for:

- ◆ **Traveling to the activity site**
- ◆ **Lodging**
- ◆ **Eating and drinking**
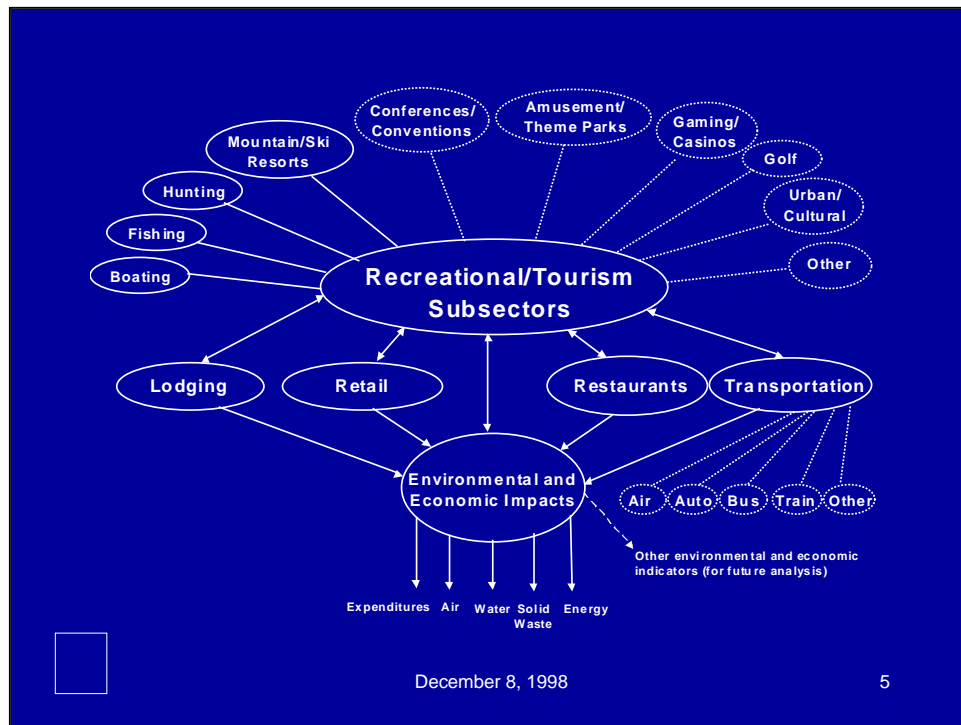- ◆ **Retail associated with the activity**
- ◆ **Activities themselves**

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Methodology

This Model is a Work in Progress

- ◆ A few economic and environmental indicators
- ◆ A few activities/subsectors
- ◆ Direct impacts only (no indirect impacts)

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Economic and Environmental Indicators

- ◆ **Four Environmental Indicators**
  - ■ **Solid waste generation**
  - ■ **Air emissions (NOx, HC, CO)**
  - ■ **Energy use**
  - ■ **Water use**
- ◆ **Expenditures**
- ◆ **Participation**

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Four Tourism and Recreation Activities

- ◆ **Mountain/Ski Resorts**
- ◆ **Fishing**
- ◆ **Hunting**
- ◆ **Boating**

Others
  - ■ **Golf**
  - ■ **Amusement/Theme Parks**
  - ■ **Conferences/Conventions**

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Sources of Data

- ◆ **Industry Trade Association Surveys**
- ◆ **Government Agency Surveys**
- ◆ **Engineering Texts and Design Manuals**
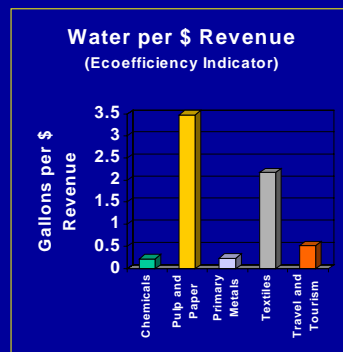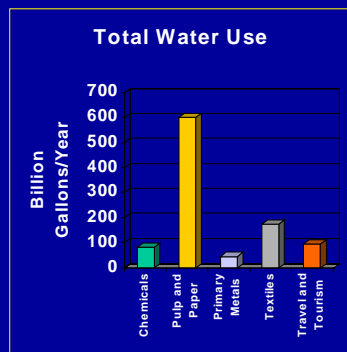- ◆ **EPA Program Offices**
- ◆ **Bureau of Economic Analysis**
- ◆ **Others**

Water Use Indicators

- ◆ **93.9 Billion Gallons/Year**
- ◆ **4.0% of Total US Commercial Consumption**

Total Water Use

Water per $ Revenue
(Ecoefficiency Indicator)
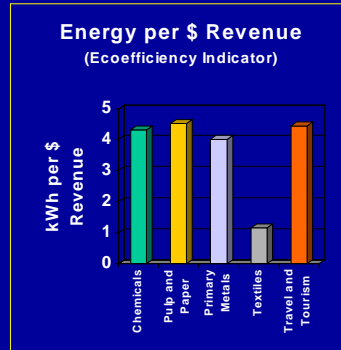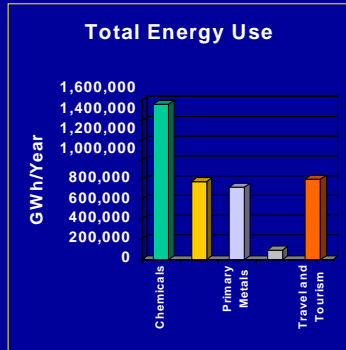
Energy Use Indicators

- ◆ **70,500 GWh Electricity/Year**
- ◆ **8.4% of Total US Commercial Consumption**
- ◆ **807,000 GWh/Year when Transportation Included**

Total Energy Use

GWh/Year
- 1,600,000
- 1,400,000
- 1,200,000
- 1,000,000
- 800,000
- 600,000
- 400,000
- 200,000
- 0

Chemicals · Primary Metals · Travel and Tourism

Energy per $ Revenue
(Ecoefficiency Indicator)

kWh per $ Revenue
- 5
- 4
- 3
- 2
- 1
- 0

Chemicals · Pulp and Paper · Primary Metals · Textiles · Travel and Tourism

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Solid Waste Generation Indicators

- ◆ **7.1 Million Tons/Year (Municipal)**
- ◆ **10.6% of Total US Commercial Generation**

Total Municipal Solid Waste Generation
(Comparison with Metropolitan Areas)

Million Tons/Year
- 20
- 15
- 10
- 5
- 0

New York · Los Angeles · Chicago · Washington/Baltimore · Travel and Tourism

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Solid Waste Generation Indicators

◆ **7.1 Million Tons/Year (Municipal)**

◆ **10.6% of Total US Commercial Generation**

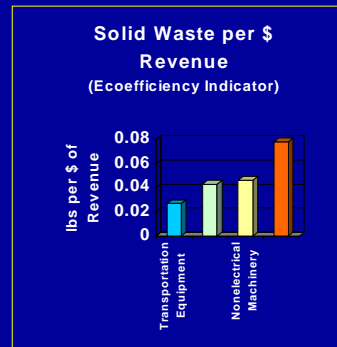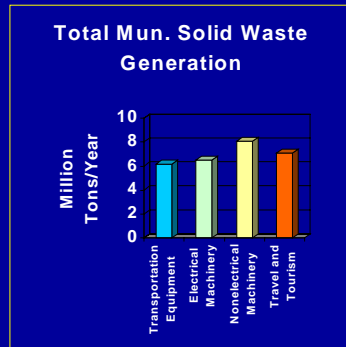**Total Mun. Solid Waste Generation**

Solid Waste per $ Revenue
(Ecoefficiency Indicator)

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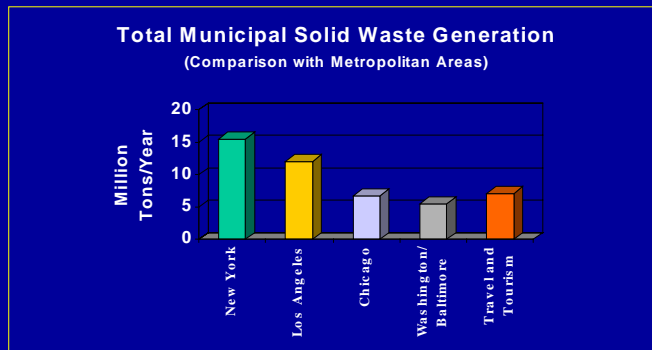
Other Measures of Sustainability?

◆ **What other economic and environmental indicators could we look at?**

◆ **Which additional subsectors?**

◆ **Other ideas?**

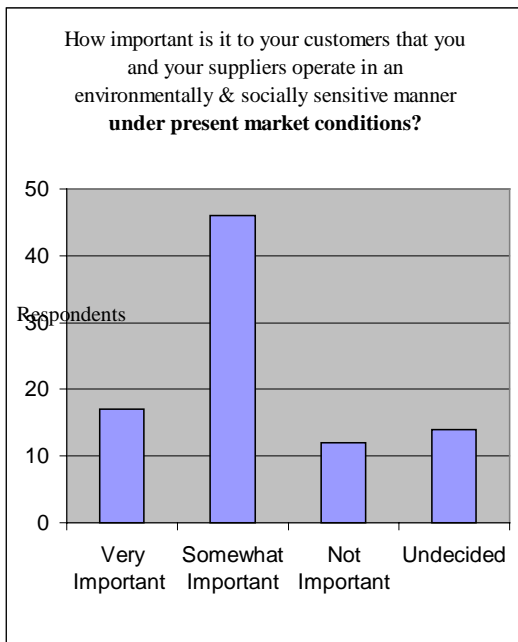◆ **What would be useful for you?**

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Annex F

SGS/GREEN GLOBE
Tourism and the Environment Survey
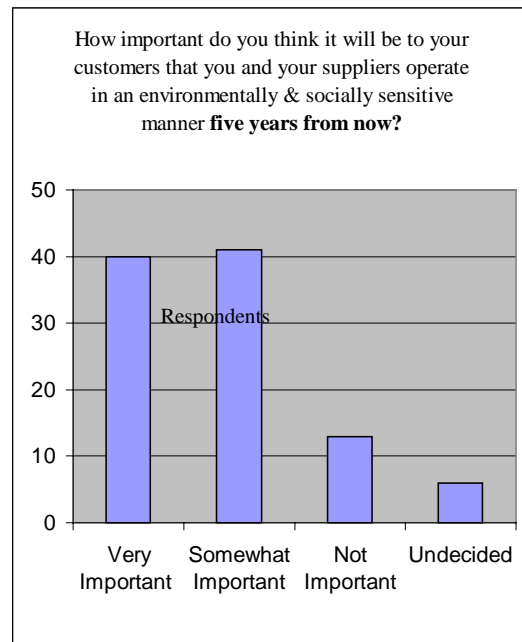
Tourism & the Environment:
A Survey of the Industry

Background:The following is a sample taken from an in-progress study. 2000 questionnaires were distributed to a cross-section of tourism and hospitality organizations. As of 12/5/98, 313 responses have been received, constituting a response rate of 16%. The following results are **PRELIMINARY**. The final report will be completed during the first part of 1999. This report was commissioned by SGS/GG and conducted by the International Institute of Tourism Studies at The George Washington University.

For the purpose of EPA/WTTC Roundtable, the results shown below are only those of the respondents that operate in **North America**.

Present Conditions

How important is it to your customers that you and your suppliers operate in an environmentally & socially sensitive manner **under present market conditions?**

Future Conditions

How important do you think it will be to your customers that you and your suppliers operate in an environmentally & socially sensitive manner **five years from now?**

Other Important Results:

• 45% of the North American participants felt that **environmental quality** is essential to the delivery of their product or service.

• **Environment** came in second only to quality when asked to rank important factors in choosing a location for a new tourism product.

• Over 60% of the respondents agreed that a lack of **environmental standards** can have a negative impact on a company's image (20% strongly agreed, 46% agreed).

Appendix G

Individual Organization - Vision, Drivers & Barriers Posters

Individual Organizational Posters: Each participant organization was asked to complete a poster listing their organization's vision for environmental sustainability, along with the drivers and barriers to obtaining this vision. The results are as follows:

Marriott International
Vision:	An environmentally conscious hospitality organization
Drivers:	Image of a global "good citizen"/Reputation enhancement, Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction, *Being* a global "good citizen",
Barriers:.	Cost in money, Cost in effort, Cost in manpower, Customer participation, Minimalist approach to issues of "consciousness".

Hagler Bailley
Vision:	Industry recognition that environment is central.
Drivers:	Growing market for type of facility/Growing market interest, Image of a global "good citizen"/Reputation enhancement, *Being* a global "good citizen", Economic Incentives
Barriers:	Cost in Money, Lack of funding, Lack of data/Information gaps/Awareness

---

EPA/PPO
Vision:	EPA/PPO (Environmentally Preferable Purchasing Program): Identify and provide the information and tools needed to make informed purchasing decisions that consider the environment in the acquisition of products and services, by considering environmental impacts throughout the life cycle of those products and services.
Drivers:	The power of market forces (demand) if harnessed, especially of government and other large institutional purchasers, Market failures require government involvement, *Being* a global "good citizen", Image of a global "good citizen"/Reputation enhancement, Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction, Public pressure/Demand, Presidential Executive Orders, Increase in efficiencies to benefit the economy, the environment and human health: EPA/PPO
Barriers:	Statutory boundaries, Lack of data/Information gaps/Awareness, Lack of assigned values for many environmental impacts, Lack of data/Information gaps/Awareness, Local conditions vary making national standard challenging, Role of organization seen as adversarial (not as partner or facilitator), Agency's institutional culture

---

The Coastal Resources Center University of Rhode Island
Vision:	Full participation of all stakeholders in planning, policy development and decision making; increased capacity for "local" management in coastal areas.
Drivers:	Enhanced local ability to influence resource use decisions, BMP's, Management plans,
Barriers:	Lack of sectoral coordination (horizontal/vertical), Lack of data/Information gaps/Awareness, Limited local level empowerment, Lack of shared experiences and management tools to guide sustainable coastal development/Lack of education and political motivation for local leaders.

Green Seal
Vision:	+/- 50,000 US lodging properties operating using environmentally responsible products, practices, and services.
Drivers:	Image of a global "good citizen"/Reputation enhancement, Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction, Economic Incentives, Environmental preservation to aid long term organizational success,
Barriers:	Cost in Money, Being a leader vs. Consumer demands (chicken and egg)

Maho Bay Camps, Inc
Vision: Sustainable design resorts, which focus on regional self-sufficiency.
Drivers: Growing market for type of facility/Growing market interest, Economic Incentives
Barriers: Archaic building codes, Lack of sustainable technical development

AVIS Rent A Car
Vision: Practice business in ways that safeguard the environment.
Drivers: Educational opportunities for tourism business,
Barriers: Trying to coordinate a vast number of facilities to ensure all are operating consistently with corporate environmental practices, Guidance documents for facilities (forwarded to all locations, ie. spill prevention, storm-water best management practice, etc)

International Expeditions
Vision: Utilizing natural history travel/ecotourism as a strategy to conserve wildlife/wildlands in a sustainable and economically realistic manner.
Drivers: Ecotourism as a recognized conservation tool, International interest, Economic Incentives, Growing market for type of facility/Growing market interest
Barriers: Lack of trained personnel, Non-existent infrastructures, and Uncontrolled development/High impact natural resource usage, Out of control population growth

U.S. Doc ITA Tourism Industries
Vision: Federal agency representing tourism for U.S. policy and exports assistance and economic validity.
Drivers: Growing market for type of facility/Growing market interest, Assurance that government policy considers tourism, Increase in tourism related jobs in U.S.,
Barriers: Lack of funding, Fragmented government involvement

Western States Tourism Policy Council
Vision: Respect the land we love.
Drivers: Public pressure/Demand, Growing market for type of facility/Growing market interest
Barriers: Cost in Money, Fragmenting of industry/Lack of industry acceptance and awareness, Lack of data/Information gaps/Awareness

Holland and Knight/Strategic Environmental Management Services
Vision: Assist tourism organizations to reduce adverse environmental impact and create beneficial environmental impacts.
Drivers: Growing market for type of facility/Growing market interest, No interest in "touring" environmentally devastated destinations
Barriers: Lack of external market drivers, Insufficient leadership within organization/Organizational structure

National Trust for Historic Preservation
Vision: National Trust leads communities towards preserving places of heritage, revitalizing down towns and promoting sustainable heritage tourism practices.
Drivers: Partnerships, Grant funding, Technical/Field assistance, Successful models
Barriers: Limited national/local resources, Lack of data/Information gaps/Awareness, Lack of shared experiences and management tools to guide sustainable coastal development/Lack of education and political motivation for local leaders

The George Washington University/ International Institute of Tourism Studies
Vision: Making sustainable tourism a reality through education and training.
Drivers: Growing market for type of facility/Growing market interest, Technology/Information networks,
Barriers: Cost in Money, Fragmenting of industry/Lack of industry acceptance and awareness

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NOAA-National Ocean Service
Vision: The National Marine Sanctuary Program's Eco-tourism Initiative successfully balances awareness and education of the importance of a healthy coastal environment with small-scale economic development for the communities adjacent to the sanctuaries.
Drivers: Being a global "good citizen", Image of a global "good citizen"/Reputation enhancement
Barriers: Low visibility of sanctuaries, Sanctuary program still in infancy stage, Need to convince community that organization is not just interesting in regulation, Lack of data/Information gaps/Awareness

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Carlson Hospitality Worldwide
Vision: Attract customers because of the company's responsible environmental policies and programs; establish environmental policy as a strategic imperative for the organization.
Drivers: Being a global "good citizen", Image of a global "good citizen"/Reputation enhancement, Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction, Economic Incentives,
Barriers: Providing a compelling business reason to invest in environmental programs

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National Geographic Traveler
Vision: Leader in "aware" travel information.
Drivers: Seeking less mature demographic
Barriers: Advertisers may object to editorial content, Focus of company is to educate by entertaining, not lecturing

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DOI-Bureau of Indian Affairs
Vision: Development and promotion of sustainable travel and tourism ventures in Indian Country.
Drivers: Increase in tourism related jobs in U.S, Being a global "good citizen"
Barriers: Cost in Money, Lack of data/Information gaps/Awareness

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Conservation Tourism, LTD
Vision: To provide access to and interpretation of nature for visitors with minimal impact, "Ideal Vision"-- in the U.S. and well as worldwide, "The Ultimate"--work on national park visitation solutions.
Drivers: Being a global "good citizen", Economic Incentives
Barriers: Cost in Money, Limited national/local resources

National Park Service Concessions
Vision: NPS Concessionaires go beyond industry norms to become leaders in environmental education, and sustainable design practices.
Drivers: Being a global "good citizen", Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction, Economic Incentives
Barriers:

American Association of Airport Executives
Vision: Tying the airport community to their local and national environmental issues and players through education, advocacy and guidance.
Drivers: Being a global "good citizen", Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction, Economic Incentives,
Barriers: Unreasonable/Inappropriate regulation

Patagonia
Vision: To save/promote wild areas and reduce corporate impacts.
Drivers: Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction
Barriers: Uncontrolled development/High impact natural resource usage

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WTTC
Vision: Industry (supply) and consumers (demand); Recognize and act on Agenda 21 for travel and tourism principles.
Drivers: Growing market for type of facility/Growing market interest, Being a global "good citizen"
Barriers: Cost in Money, Lack of data/Information gaps/Awareness, Competition, Duplication/ Overlapping efforts

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Conservation International
Vision: Biodiversity conservation through sustainable tourism practices and integral costing.
Drivers: Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction
Barriers: Cost in Money, Lack of data/Information gaps/Awareness, Lack of sustainable technical development

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Cruise Lines
Vision: Environmentally sound cruise vacations.
Drivers: Growing market for type of facility/Growing market interest, Economic Incentives
Barriers: Lack of sustainable technical development, Non-existent infrastructures

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Eco Tourism International
Vision: Narrow the gap between the eco-tourism and the mass tourism industry (i.e. bring professionalism to eco-tourism and greater environmental/social awareness to the mass tourism segment).
Drivers: Growing market for type of facility/Growing market interest, Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction, Public pressure/Demand, Regulation/Certification, Investors/Bankers, Technology/Information networks
Barriers: Cost in Money, Lack of data/Information gaps/Awareness, Insufficient leadership within organization/Organizational structure

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American Hotel and Motel Association
Vision: Management commitment to incentive based environmental policy.
Drivers: Growing market for type of facility/Growing market interest, *Being* a global "good citizen", Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction, Investors/Bankers, Technology/Information networks, Regulation/Certification
Barriers: Cost in Money, Non-existent infrastructures

Unidentified Organization
Vision: Caring for Land—Serving People, Offer quality recreation and tourism experiences with minimal impacts to ecosystem stability (including communities) and condition (forest landscape).
Drivers: Growing market for type of facility/Growing market interest, Being a global "good citizen", Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction, Educational opportunities for tourism business, Partnerships Cruise Lines
Barriers: Cost in Money, Insufficient leadership within organization/Organizational structure

Air Transport Association
Vision:
Drivers: Customer appeal and empowerment/The consumer being presented with an opportunity to reward those who are providing "greener" products or services/Employee and guest satisfaction, Public pressure/Demand
Barriers: Cost in Money, Competition, Protection of Investment